



Activity Guide – AR350: Maintaining Customers

State of Kansas



AR350: Maintaining Customers Activity Guide

Statewide Management, Accounting and Reporting Tool



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Activity 1 - Demonstration: Entering a Customer

Scenario

In this scenario, you are a **Customer Creator**. Your supervisor has just informed you of a new customer with whom your agency is doing business. She has provided you with a document containing all the required fields for entering the customer and asked that you set the customer up for dunning. Navigate to the **General Information** page and add a new customer.

Menu Path

Customers → Customer Information → General Information → Add a New Value

UPK Procedure

Entering Customer Information

Job Aid

Not Applicable

Instructions

Watch your instructor as he/she demonstrates how to enter a customer in SMART. Do NOT perform this exercise along with your instructor.

Required Data

Field	Value
<i>General Information: Add a New Value</i>	
SetID	17300
Customer ID	NEXT
<i>General Info</i>	
Type	OTHER
Name 1	[Instructor Name]
Short Name	Leave blank <populates automatically>
Currency Code	USD
Rate Type	CRRNT
Bill To Customer	Checkbox selected
Team Code	KANSAS
Default	Checkbox selected
Description	Main Office
Bill To	Checkbox selected
Primary (for Bill To)	Checkbox selected
Correspondence Address	Checkbox selected
Address 1	108 N Kansas Avenue



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Field		Value
City		Topeka
State		KS
Postal		66603
<i>Bill To Options</i>		
Credit Analyst		001
Collector		3RDPARTY
AR Specialist		17300
<i>General Info → Correspondence Options</i>		
Dunning ID		KSDUN
Statement ID		STATE

Activity 2 - Exercise: Entering a Customer

Scenario

In this scenario, you are a **Customer Creator**. Your supervisor has just informed you of a new customer with whom your agency is doing business. She has provided you with a document containing all the required fields for entering the customer and asked that you set the customer up for dunning. Navigate to the **General Information** page and add the new customer.

Menu Path

Customers → Customer Information → General Information → Add a New Value

UPK Procedure

Entering Customer Information

Job Aid

Not Applicable

Instructions

Use the appropriate steps from the previous Instructor led walkthrough(s) to complete the exercise scenario in SMART. For fields in the Required Data table that require “user specific data,” be sure to use **ONLY** the user number that your instructor has assigned to you. If you need assistance as you complete this exercise, refer to the UPK. If there is not a UPK, then refer to the Instructor for guidance.

Required Data

Field	Value
<i>General Information: Add a New Value</i>	
SetID	17300
Customer ID	NEXT
<i>General Info</i>	
Customer Status	Active
Date Added	<Enter today's date>
Since	<Enter today's date>
Type	OTHER
Name 1	[your name] Office Supplies
Short Name	<Leave blank> (populates automatically)
Currency Code	USD
Rate Type	CRRNT
Bill To Customer	Checkbox selected
Team Code	KANSAS



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Field	Value
Default	Checkbox selected
Location	1
Description	Main Office
Bill To	Checkbox selected
Primary (for Bill To)	Checkbox selected
Effective Date	<Keep default>
Address 1	108 N Kansas Avenue
Address 2	Room [your User ID number]
City	Topeka
State	KS
Postal	66603
<i>Bill To Options</i>	
Credit Analyst	001
Collector	3RDPARTY
AR Specialist	17300
Billing Specialist	GLH
<i>General Info → Correspondence Options</i>	
Dunning ID	KSDUN
Statement ID	STATE



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Activity 3 - Walkthrough: Copying an Existing Customer

Scenario

In this scenario, you are a **Customer Creator** that needs to add a new customer. The customer has the same general information, roles, and addresses as an existing customer, Kroner Phone Service (customer ID - 000000000000101). Use the **Copy from Customer** link to copy Kroner Phone Service's customer information into the new customer's profile. Then, update the address information specified below and save the new customer.

Menu Path

Customers → Customer Information → General Information → Add a New Value

UPK Procedure

Not Applicable

Job Aid

Not Applicable

Instructions

Follow along with your instructor as he/she demonstrates how to copy an existing customer in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require "user specific data," be sure to use ONLY the user number that your instructor has assigned to you.

Required Data

Field	Value
<i>General Information: Add a New Value</i>	
SetID	17300
Customer ID	NEXT
<i>General Info</i>	
Name 1	[your name] Phone Services
Short Name	Leave blank <populates automatically>
<i>Click Copy From Customer Link</i>	
<i>Copy Customer</i>	
Customer ID	See user specific data
General Information	Checkbox selected
Addresses	Checkbox selected
Bill To Options	Checkbox selected
Bill To Customers	Checkbox selected
Support Teams	Checkbox selected
<i>Click the OK button</i>	



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Field		Value
<i>General Info: Address Details</i>		
Address 2		Suite [your User ID number]

Activity 4 - Demonstration: Updating Customer Types and General Customer Information

Scenario

In this simulation, you are a **Customer Creator**. One of your peers has notified you that when Sam's Specialties was created, the customer type was accidentally set to "FEDGOV" for Federal Government. The customer type should be set to "Other".

You also received an email from the customer contact that they have just moved their main office to a new location in downtown Topeka. Use the **General Info** page to update the customer type and add a new address location for the customer of 756 Kansas Avenue, Topeka, KS 66612.

Menu Path

Customer → Customer Information → General Information → Find an Existing Value

UPK Procedure

Not Applicable

Job Aid

Not Applicable

Instructions

Watch your instructor as he/she demonstrates how to update customer type and general information. Do NOT perform this exercise along with your instructor.

Required Data

Field	Value
<i>General Information: Find an Existing Value</i>	
SetID	17300
Customer ID	See user specific data
<i>General Info</i>	
Type	OTHER
* Click the + button to add new Address Details	
Address 1	756 Kansas Avenue
City	Topeka
Postal	66612



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Classroom 1 - User Specific Data

User	Field	Value
Instructor 1	Customer ID	0000000000000303
Backup 1	Customer ID	0000000000000304
Backup 2	Customer ID	0000000000000305

Classroom 2 - User Specific Data

User	Field	Value
Instructor 1	Customer ID	0000000000000306
Backup 1	Customer ID	0000000000000307
Backup 2	Customer ID	0000000000000308

Activity 5 - Walkthrough: Correspondence Customer Options

Scenario

In this scenario, you are an **AR Agency Administrator**. You need to set up correspondence defaults and options for your customer, including changing bank account information.

Menu Path

Customers → Customer Information → General Information → Find an Existing Value

UPK Procedure

Not Applicable

Job Aid

Not Applicable

Instructions

Follow along with your instructor as he/she demonstrates how add customer correspondence options in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require “user specific data,” be sure to use ONLY the user number that your instructor has assigned to you.

Required Data

Field	Value
<i>General Information: Find an Existing Value</i>	
SetID	17300
Customer ID	See User Specific Data
<i>General Info Links: Correspondence Options</i>	
* Click the + button to add new Correspondence Options	
Effective Date	<Today's Date>
<i>Correspondence Options: Remit To</i>	
Bank	Remit
Account	173B

Classroom 1 - User Specific Data

User	Field	Value
Instructor 1	Customer ID	000000000000035
Instructor 2	Customer ID	000000000000036
Instructor 3	Customer ID	000000000000037
User 1	Customer ID	000000000000038
User 2	Customer ID	000000000000039



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User	Field	Value
User 3	Customer ID	000000000000040
User 4	Customer ID	000000000000041
User 5	Customer ID	000000000000042
User 6	Customer ID	000000000000043
User 7	Customer ID	000000000000044
User 8	Customer ID	000000000000045
User 9	Customer ID	000000000000046
User 10	Customer ID	000000000000047
User 11	Customer ID	000000000000048
User 12	Customer ID	000000000000049
User 13	Customer ID	000000000000050
User 14	Customer ID	000000000000051
User 15	Customer ID	000000000000052
User 16	Customer ID	000000000000053
User 17	Customer ID	000000000000054
User 18	Customer ID	000000000000055
User 19	Customer ID	000000000000056
User 20	Customer ID	000000000000057

Classroom 2 - User Specific Data

User	Field	Value
Instructor 1	Customer ID	000000000000058
Instructor 2	Customer ID	000000000000059
Instructor 3	Customer ID	000000000000060
User 1	Customer ID	000000000000061
User 2	Customer ID	000000000000062
User 3	Customer ID	000000000000063
User 4	Customer ID	000000000000064
User 5	Customer ID	000000000000065
User 6	Customer ID	000000000000066
User 7	Customer ID	000000000000067
User 8	Customer ID	000000000000068
User 9	Customer ID	000000000000069
User 10	Customer ID	000000000000070
User 11	Customer ID	000000000000071
User 12	Customer ID	000000000000072
User 13	Customer ID	000000000000073
User 14	Customer ID	000000000000074



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User	Field	Value
User 15	Customer ID	0000000000000075
User 16	Customer ID	0000000000000076
User 17	Customer ID	0000000000000077
User 18	Customer ID	0000000000000078
User 19	Customer ID	0000000000000079
User 20	Customer ID	0000000000000080



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Activity 6 - Walkthrough: Contacts

Scenario

In this scenario, you will set up Contact information for a customer.

Menu Path

Customers → Contact Information → Add a New Value

UPK Procedure

Not Applicable

Job Aid

Not Applicable

Instructions

Follow along with your instructor as he/she demonstrates how add customer correspondence options in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require "user specific data," be sure to use ONLY the user number that your instructor has assigned to you.

Field	Value
<i>Customers → Contact Information → Add a New Value</i>	
Name	your name
Title	Purchasing Manager
Email ID	smartraining@da.ks.gov
Preferred Communication	Email only
<i>Contact Phone and Type</i>	
Phone Type	BUSN
Phone Number	785/222-2222
Extension	2605
<i>Contact Customer Information</i>	
Customer Set ID	17300
Customer Number	User specific data
Location	1
Save	
Search for Contact information for a customer	
<i>Customers → Contact Information → Find an Existing Value</i>	
SetID	17300
Customer Number	User specific data

Classroom 1 - User Specific Data



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Classroom 1 - User Specific Data

User	Field	Value
Instructor 1	Customer ID	000000000000196
Instructor 2	Customer ID	000000000000197
Instructor 3	Customer ID	000000000000198
User 1	Customer ID	000000000000199
User 2	Customer ID	000000000000200
User 3	Customer ID	000000000000201
User 4	Customer ID	000000000000202
User 5	Customer ID	000000000000203
User 6	Customer ID	000000000000204
User 7	Customer ID	000000000000205
User 8	Customer ID	000000000000206
User 9	Customer ID	000000000000207
User 10	Customer ID	000000000000208
User 11	Customer ID	000000000000209
User 12	Customer ID	000000000000210
User 13	Customer ID	000000000000211
User 14	Customer ID	000000000000212
User 15	Customer ID	000000000000213
User 16	Customer ID	000000000000214
User 17	Customer ID	000000000000215
User 18	Customer ID	000000000000216
User 19	Customer ID	000000000000217
User 20	Customer ID	000000000000218

Classroom 2 - User Specific Data

User	Field	Value
Instructor 1	Customer ID	000000000000219
Instructor 2	Customer ID	000000000000220
Instructor 3	Customer ID	000000000000221
User 1	Customer ID	000000000000222
User 2	Customer ID	000000000000223
User 3	Customer ID	000000000000224
User 4	Customer ID	000000000000225
User 5	Customer ID	000000000000226
User 6	Customer ID	000000000000227
User 7	Customer ID	000000000000228
User 8	Customer ID	000000000000229
User 9	Customer ID	000000000000230



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User	Field	Value
User 10	Customer ID	000000000000231
User 11	Customer ID	000000000000232
User 12	Customer ID	000000000000233
User 13	Customer ID	000000000000234
User 14	Customer ID	000000000000235
User 15	Customer ID	000000000000236
User 16	Customer ID	000000000000237
User 17	Customer ID	000000000000238
User 18	Customer ID	000000000000239
User 19	Customer ID	000000000000240
User 20	Customer ID	000000000000241



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Activity 7 - Walkthrough: Attachments

Scenario

In this scenario, you are an **Agency AR Administrator**. You have received several emails from one of your customers and have decided that they should be attached to the customer's record. Rather than retyping the emails as a customer conversation, the files have been combined into a single Word document that you need to attach.

Menu Path

Customers → Customer Information → General Information → Find an Existing Value

UPK Procedure

Not Applicable

Job Aid

Not Applicable

Instructions

Follow along with your instructor as he/she demonstrates how to add attachments for a customer in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require "user specific data," be sure to use ONLY the user number that your instructor has assigned to you.

Required Data

Field	Value
<i>General Information: Find an Existing Value</i>	
SetID	17300
Customer ID	See User Specific Data
<i>General Info Links: Attachments</i>	
Attachment Information Section	Click the Add button, click Browse
Attached File	CustomerEmails.txt

Classroom 1 - User Specific Data

User	Field	Value
Instructor 1	Customer ID	000000000000101
Instructor 2	Customer ID	000000000000102
Instructor 3	Customer ID	000000000000103
User 1	Customer ID	000000000000104
User 2	Customer ID	000000000000105
User 3	Customer ID	000000000000106
User 4	Customer ID	000000000000107



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User	Field	Value
User 5	Customer ID	000000000000108
User 6	Customer ID	000000000000109
User 7	Customer ID	000000000000110
User 8	Customer ID	000000000000111
User 9	Customer ID	000000000000112
User 10	Customer ID	000000000000113
User 11	Customer ID	000000000000114
User 12	Customer ID	000000000000115
User 13	Customer ID	000000000000116
User 14	Customer ID	000000000000117
User 15	Customer ID	000000000000118
User 16	Customer ID	000000000000119
User 17	Customer ID	000000000000120
User 18	Customer ID	000000000000121
User 19	Customer ID	000000000000122
User 20	Customer ID	000000000000123

Classroom 2 - User Specific Data

User	Field	Value
Instructor 1	Customer ID	000000000000124
Instructor 2	Customer ID	000000000000125
Instructor 3	Customer ID	000000000000126
User 1	Customer ID	000000000000127
User 2	Customer ID	000000000000128
User 3	Customer ID	000000000000129
User 4	Customer ID	000000000000130
User 5	Customer ID	000000000000131
User 6	Customer ID	000000000000132
User 7	Customer ID	000000000000133
User 8	Customer ID	000000000000134
User 9	Customer ID	000000000000135
User 10	Customer ID	000000000000136
User 11	Customer ID	000000000000137
User 12	Customer ID	000000000000138
User 13	Customer ID	000000000000139
User 14	Customer ID	000000000000140
User 15	Customer ID	000000000000141
User 16	Customer ID	000000000000142



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User	Field	Value
User 17	Customer ID	000000000000143
User 18	Customer ID	000000000000144
User 19	Customer ID	000000000000145
User 20	Customer ID	000000000000146



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Activity 7 - Walkthrough: Notes

Scenario

In this scenario, you are a **Billing Administrator** that needs to assign a standard note to thank your customer for their business. This note is used on all invoices sent to the customer. You also need to add a custom note that includes special billing terms arranged with your primary contact at the customer. Add both notes to the customer information on the **Notes** page.

Menu Path

Customers → Customer Information → General Information → Find an Existing Value

UPK Procedure

Not Applicable

Job Aid

Not Applicable

Instructions

Follow along with your instructor as he/she demonstrates how to add notes to a customer in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require "user specific data," be sure to use ONLY the user number that your instructor has assigned to you.

Required Data

Field	Value
<i>General Information: Find an Existing Value</i>	
SetID	17300
Customer ID	See User Specific Data
<i>General Info Links: Notes</i>	
<i>Customer Note 1</i>	
Use Predefined Standard Note	Checkbox selected
Note	THANK YOU
<i>Customer Note 2</i>	
Use Predefined Standard Note	Checkbox not selected
Note Type	CUSTNOTE
Note Text	As agreed, the payment of this invoice is due 30 days upon receipt.
Invoice	Checkbox selected



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Classroom 1 - User Specific Data

User	Field	Value
Instructor 1	Customer ID	000000000000148
Instructor 2	Customer ID	000000000000149
Instructor 3	Customer ID	000000000000150
User 1	Customer ID	000000000000151
User 2	Customer ID	000000000000152
User 3	Customer ID	000000000000153
User 4	Customer ID	000000000000154
User 5	Customer ID	000000000000155
User 6	Customer ID	000000000000156
User 7	Customer ID	000000000000157
User 8	Customer ID	000000000000158
User 9	Customer ID	000000000000159
User 10	Customer ID	000000000000160
User 11	Customer ID	000000000000161
User 12	Customer ID	000000000000162
User 13	Customer ID	000000000000163
User 14	Customer ID	000000000000164
User 15	Customer ID	000000000000165
User 16	Customer ID	000000000000166
User 17	Customer ID	000000000000167
User 18	Customer ID	000000000000168
User 19	Customer ID	000000000000169
User 20	Customer ID	000000000000170

Classroom 2 - User Specific Data

User	Field	Value
Instructor 1	Customer ID	000000000000171
Instructor 2	Customer ID	000000000000172
Instructor 3	Customer ID	000000000000173
User 1	Customer ID	000000000000174
User 2	Customer ID	000000000000175
User 3	Customer ID	000000000000176
User 4	Customer ID	000000000000177
User 5	Customer ID	000000000000178
User 6	Customer ID	000000000000179
User 7	Customer ID	000000000000180
User 8	Customer ID	000000000000181



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User	Field	Value
User 9	Customer ID	000000000000182
User 10	Customer ID	000000000000183
User 11	Customer ID	000000000000184
User 12	Customer ID	000000000000185
User 13	Customer ID	000000000000186
User 14	Customer ID	000000000000187
User 15	Customer ID	000000000000188
User 16	Customer ID	000000000000189
User 17	Customer ID	000000000000190
User 18	Customer ID	000000000000191
User 19	Customer ID	000000000000192
User 20	Customer ID	000000000000193